



# HexaSync

# Profile Setup

# Guide



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# 1 Registering a HexaSync Profile

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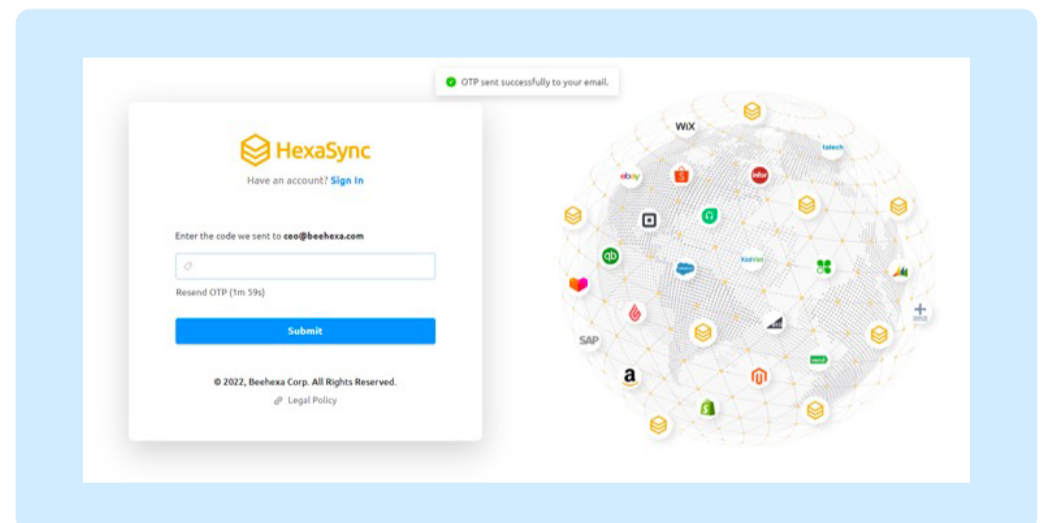
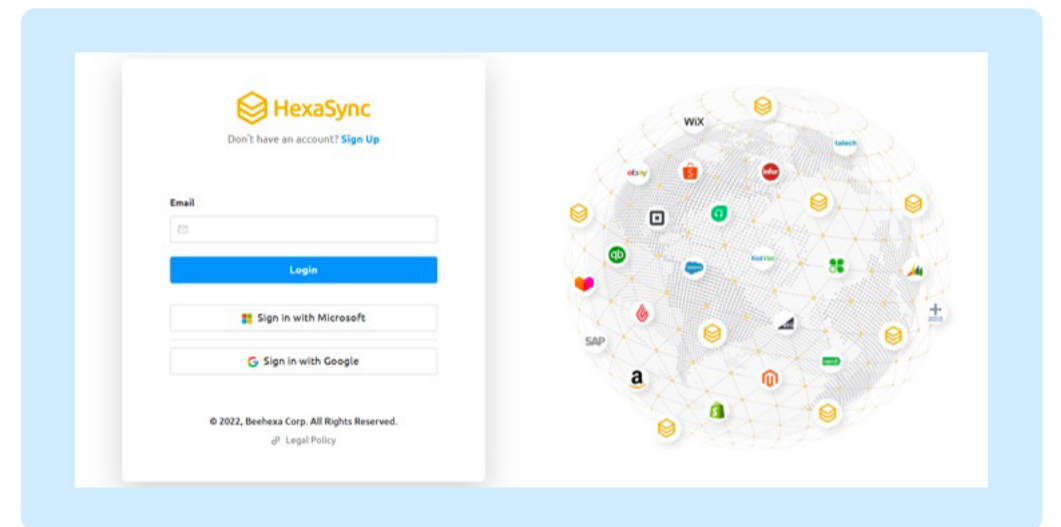
Step 3: Invite [team@beehexa.com](mailto:team@beehexa.com) to collaborate with your HexaSync profile



# Register a HexaSync Profile

**Step 1:** Creating a HexaSync account using your email address

- Visiting link:  
<https://app-az.hexasync.com/login>
- Sign up for an account by entering your email address and clicking "Login". Or you can also sign up with Microsoft or Google
- OTP code will be sent to email. Copy that OTP code here and click "Submit". So you have successfully registered an account on HexaSync.

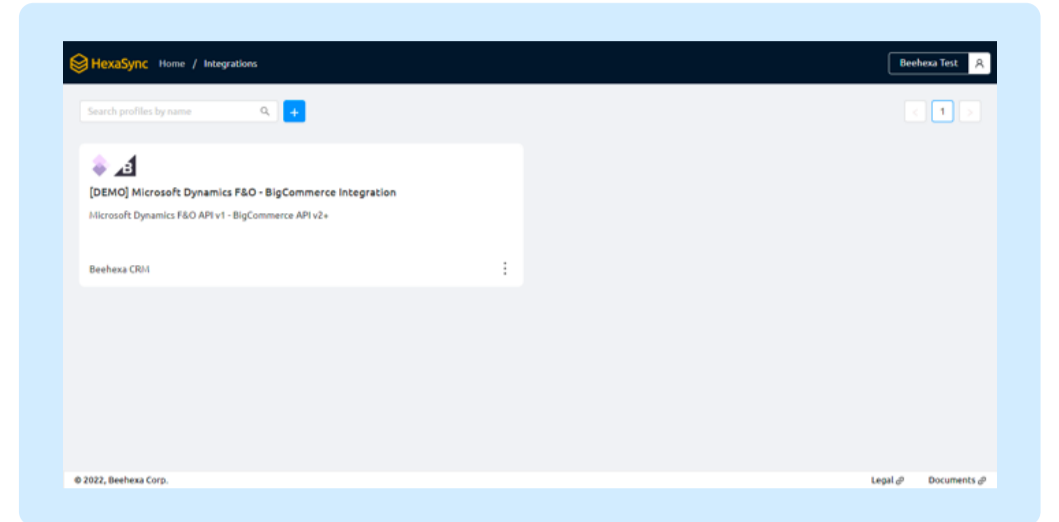


✔ OTP sent successfully to your email.

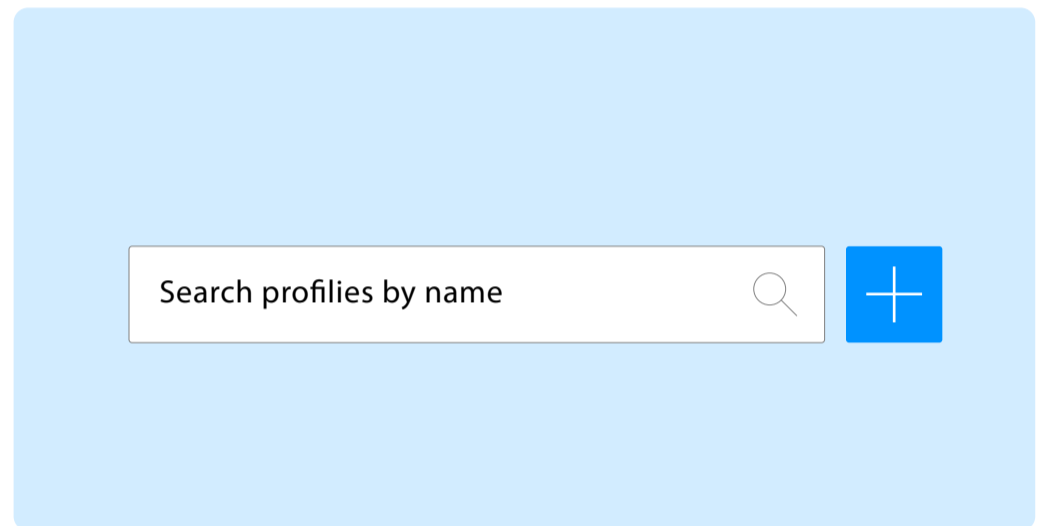


## Step 2: Creating a HexaSync profile

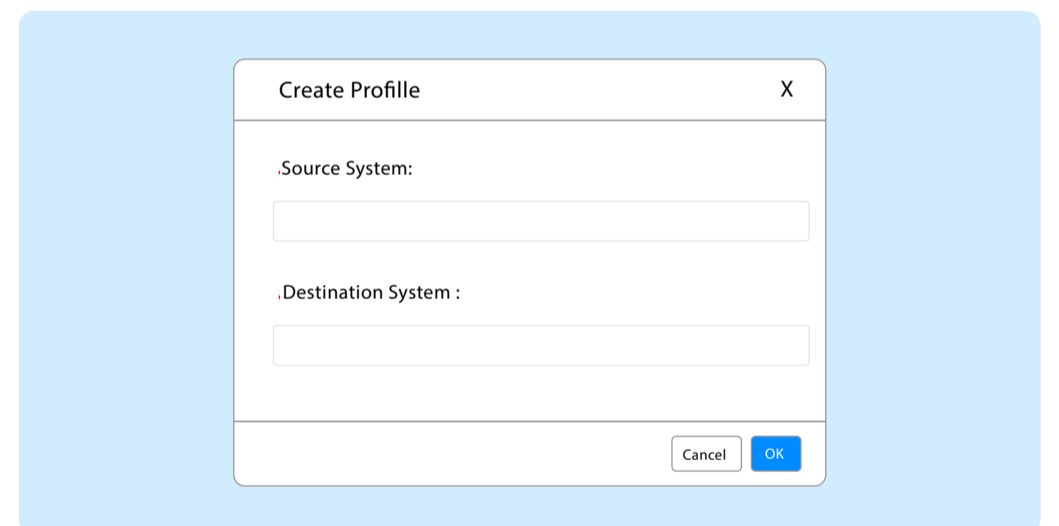
- After successful account registration the screen will appear like this.



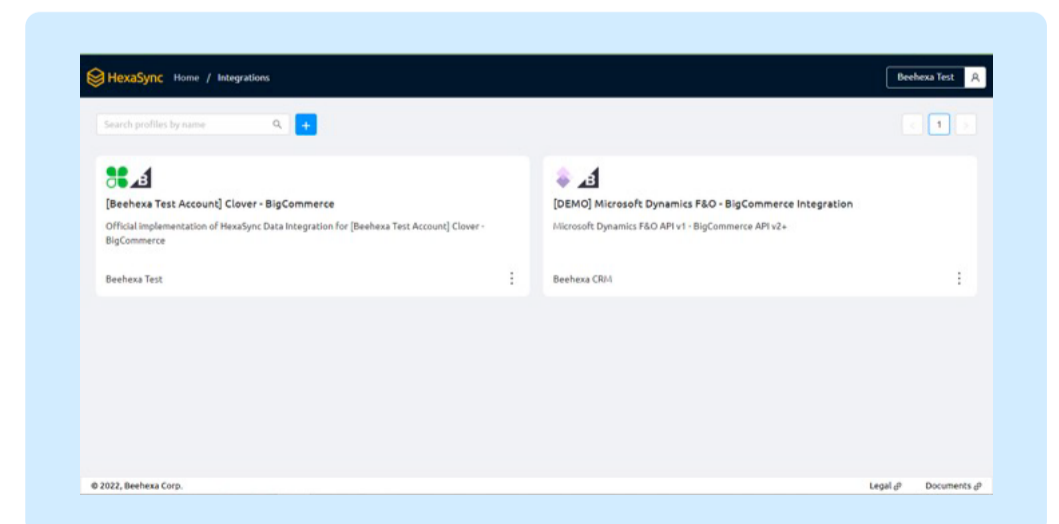
- To create a new profile, click this button.



- Choose Source System and Destination System according to your synchronization needs.
- Click "OK" and you have successfully created a HexaSync profile.



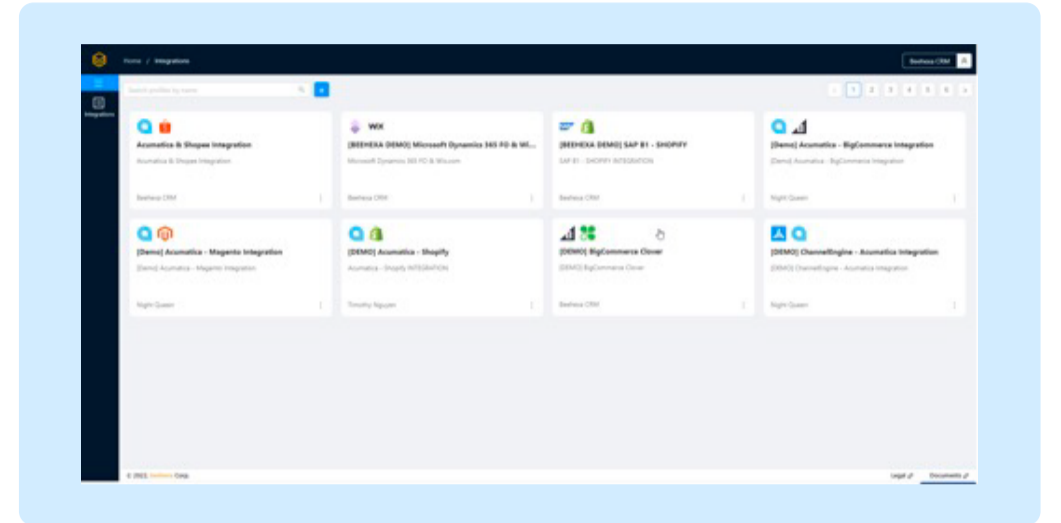
- If you need more than one HexaSync Profile, repeat the same steps as above with the remaining HexaSync profiles.



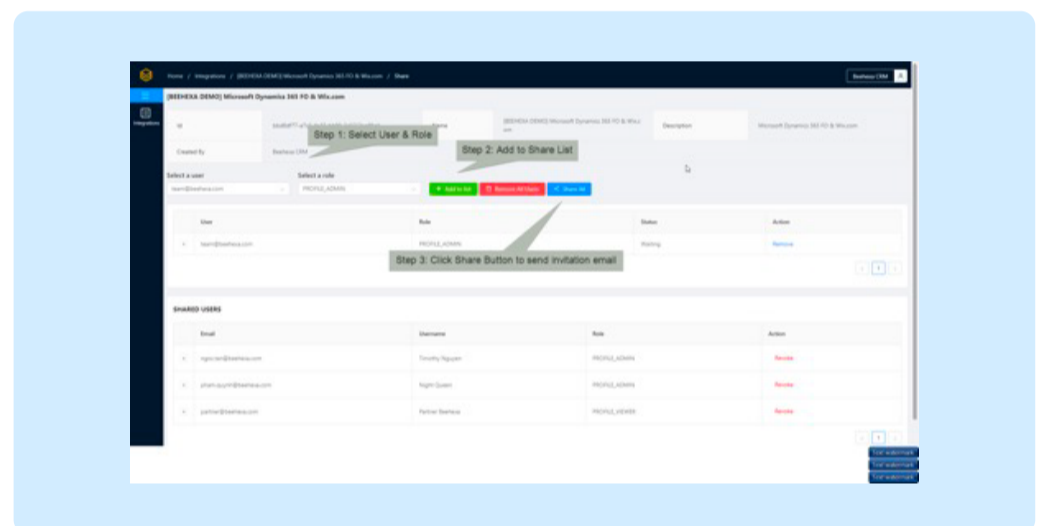


### Step 3: Invite team@beehexa.com to collaborate with your HexaSync profile

- Select "HexaSync profile" you want to share



- Invite our team to manage your integration following the instructions in the image below.





## 2 Authorize HexaSync to Access Your Zalo OA

1 Step 1: Click the link HexaSync "Zalo Callback URL"

Step 2: Choose the Zalo OA Account that you want to connect with Microsoft Dynamics 365 CRM by HexaSync

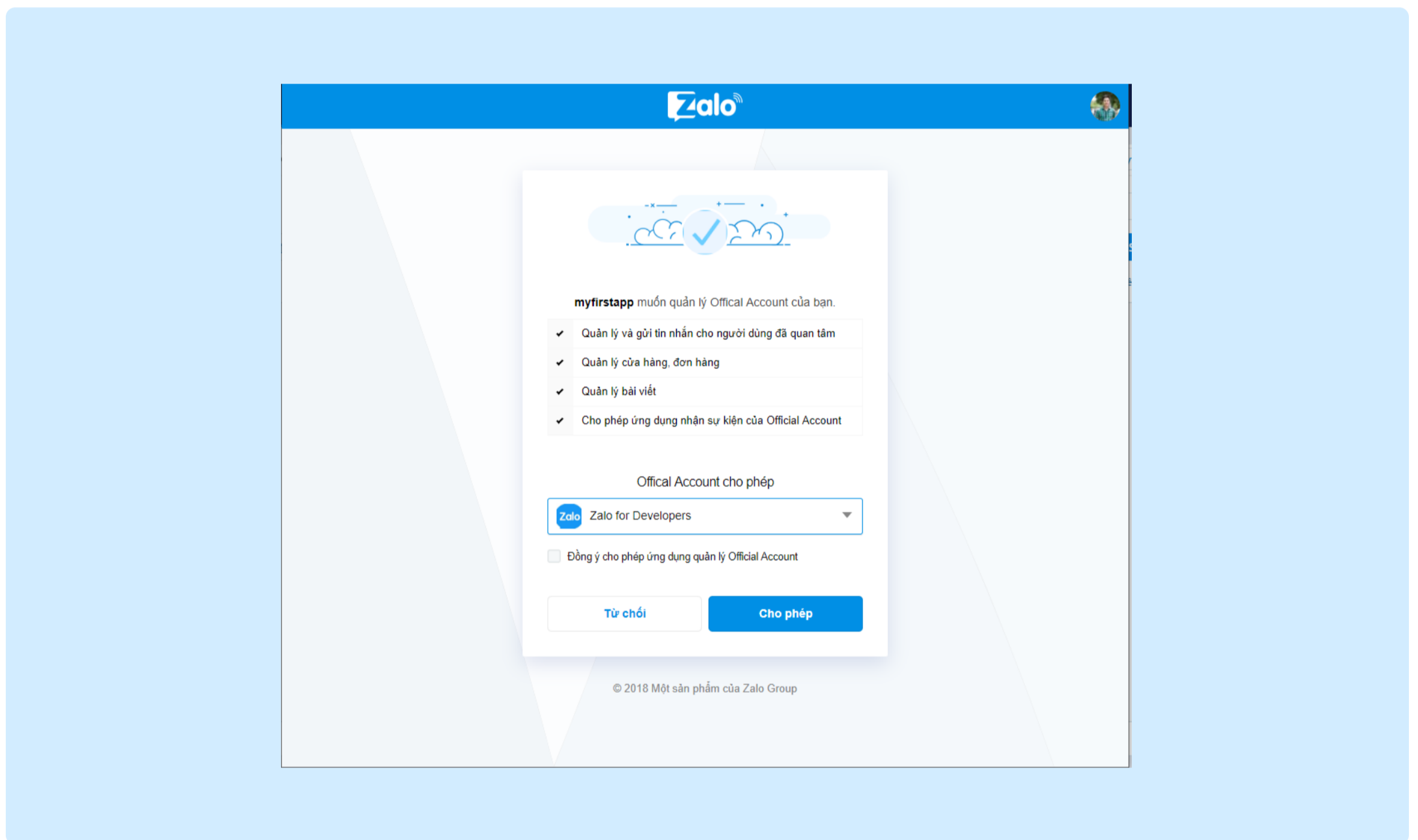
3 Step 3: Tick the box and "Accept"

Step 4: Copy the Zalo OA ID and the Authorization Code



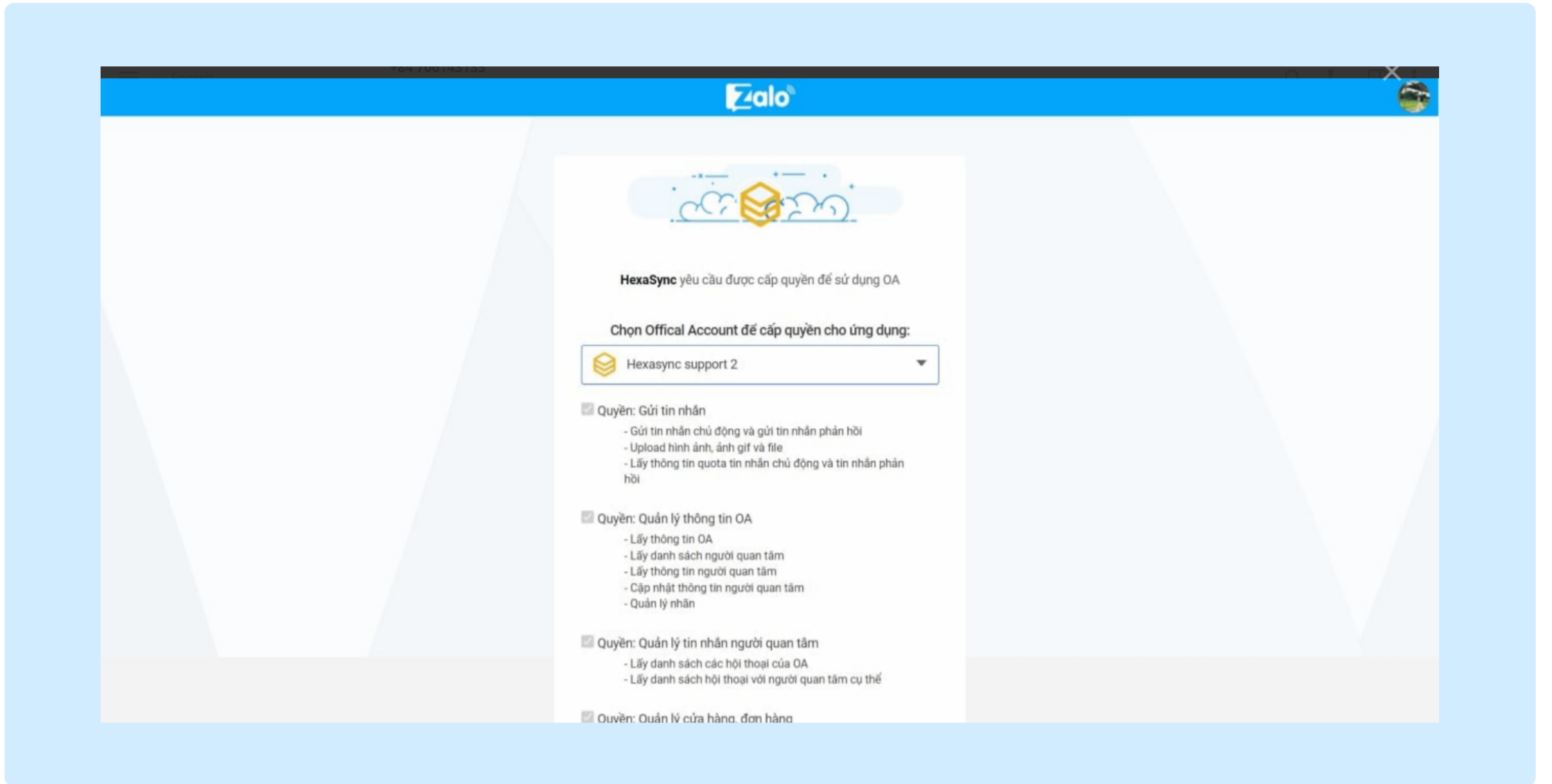
# Authorize HexaSync to Access Your Zalo OA

Authorize HexaSync To Access Your Zalo OA



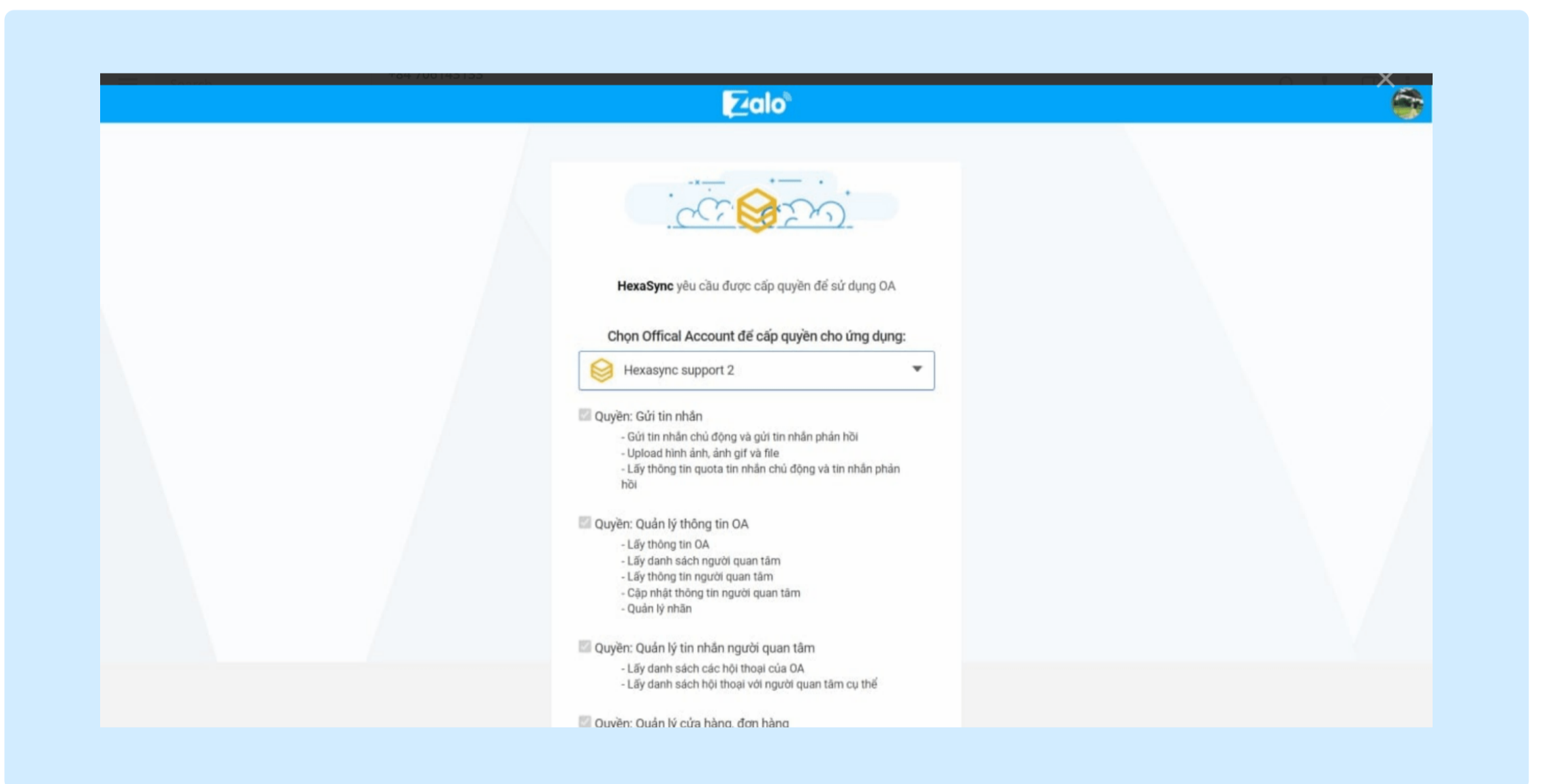
**Step 1:** Click the link HexaSync Zalo Callback URL



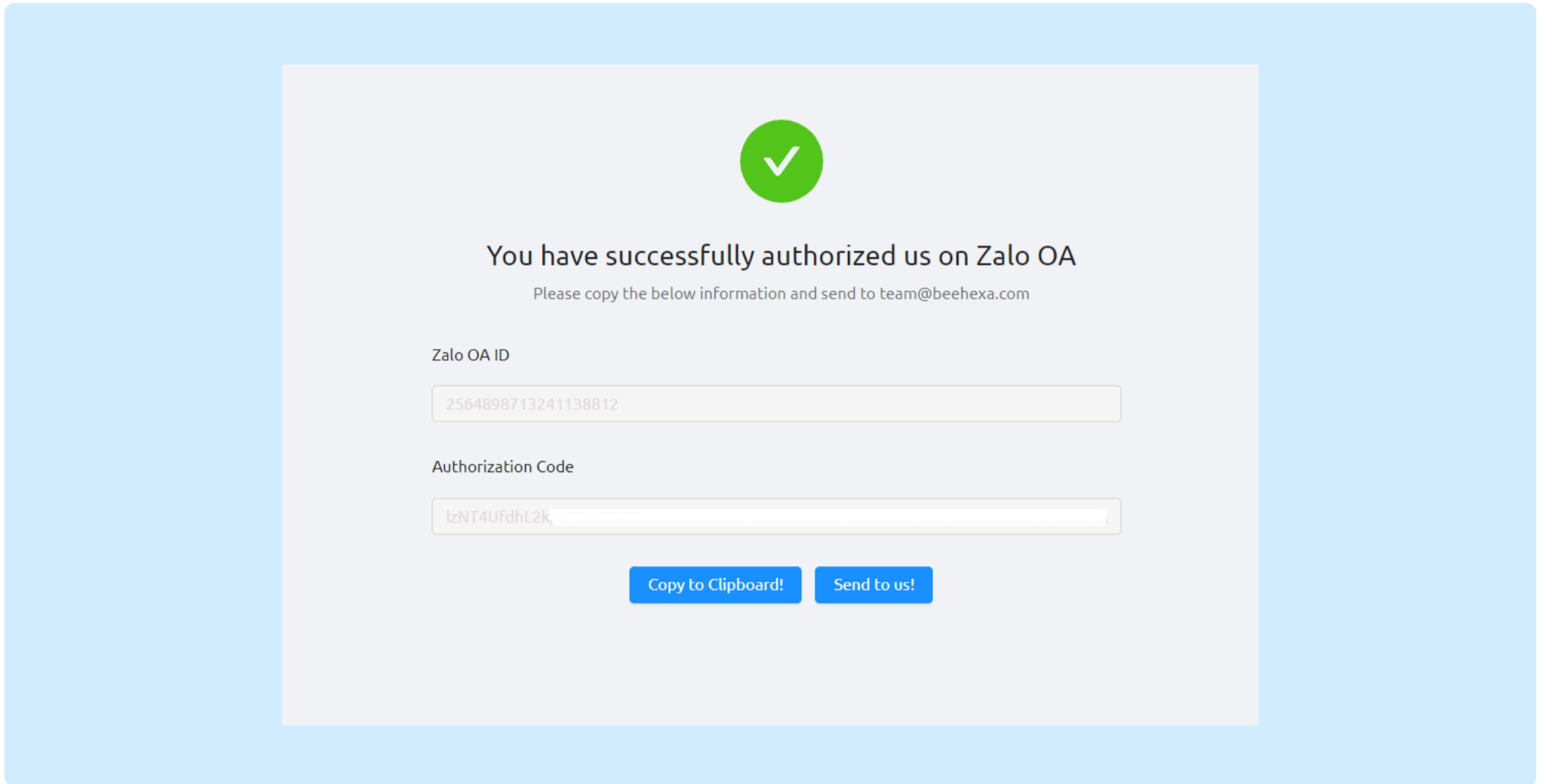


- **Step 2:** Choose the Zalo OA Account that you want to connect with Microsoft Dynamics 365 CRM by HexaSync

Note: You must be an Zalo OA Admin to grant access to Zalo OA



- **Step 3:** Tick the box and “Accept”

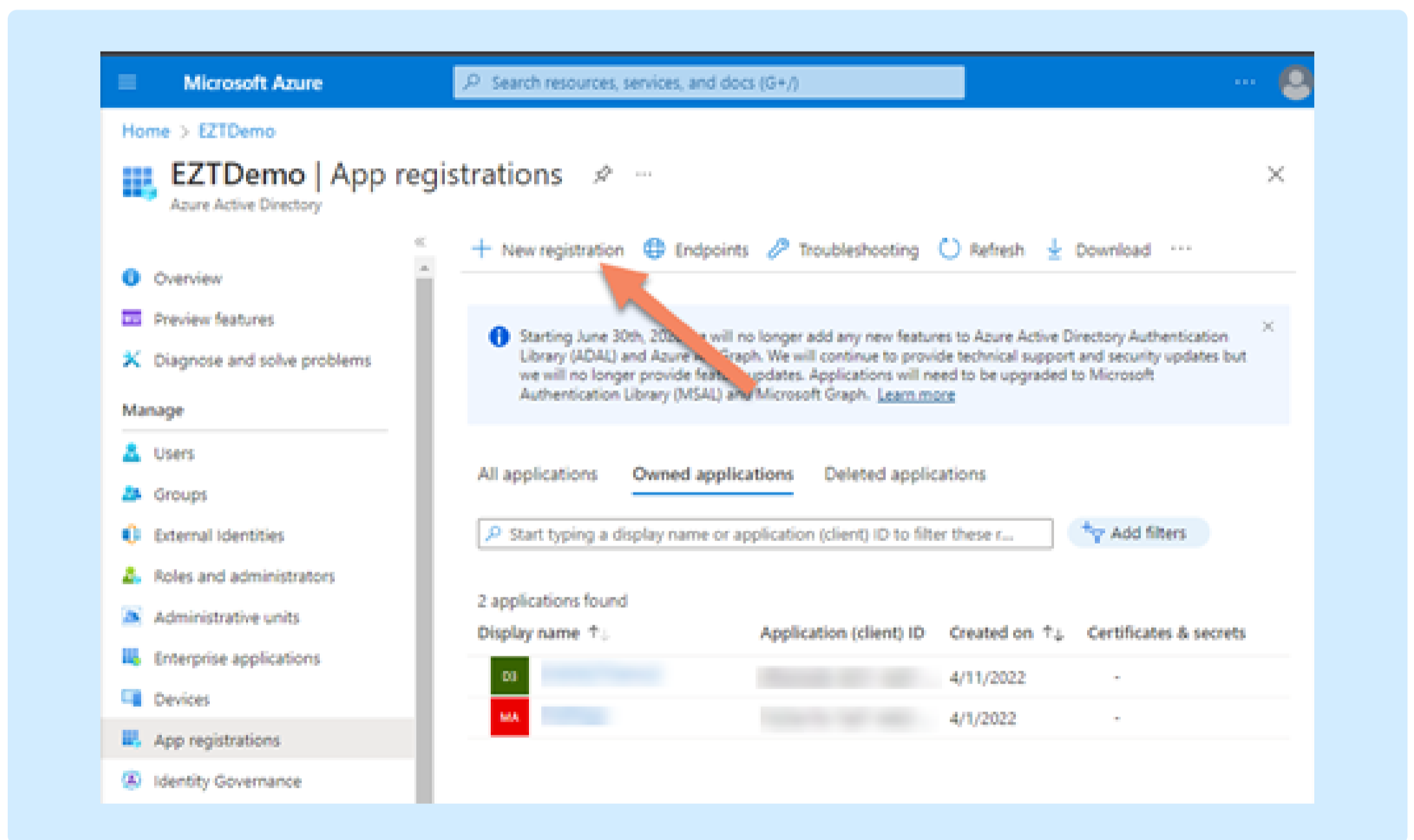


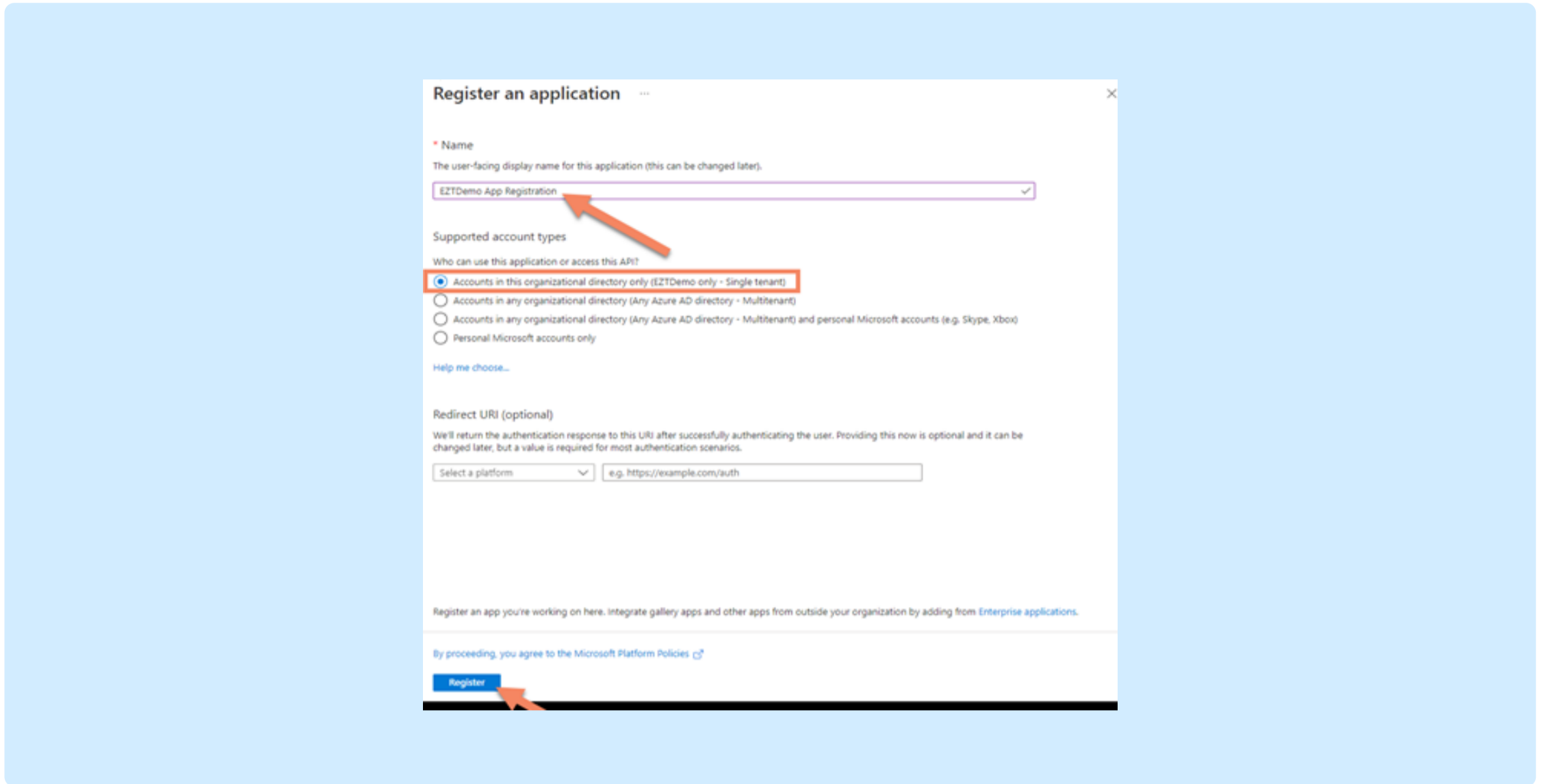
- **Step 4:** Copy the "Zalo OA ID" and the Authorization Code  
Last, please send enough information to our email team@beehexa.com.  
You are ready to go with us from that!



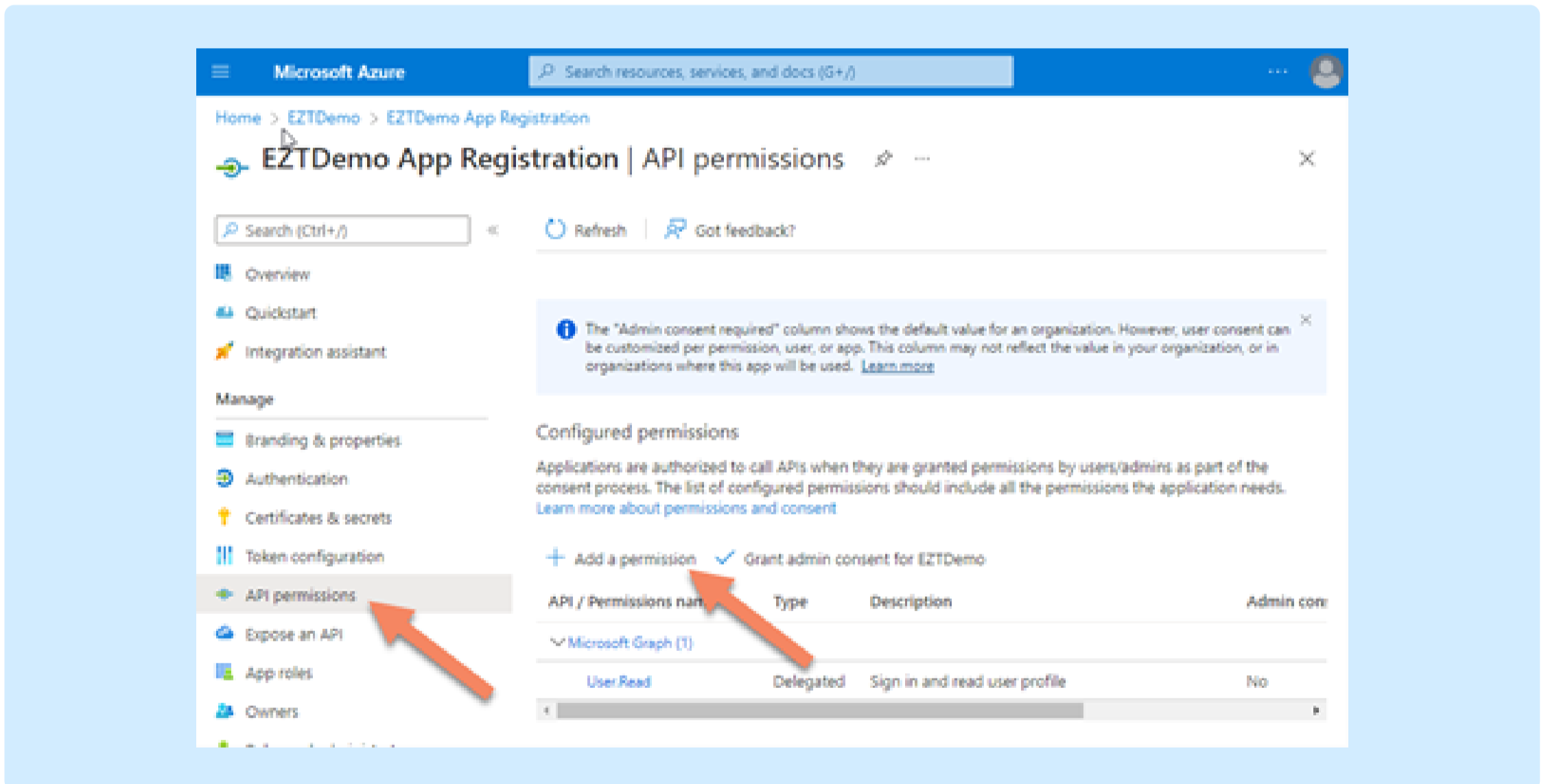
# Authorize HexaSync To Access Your Microsoft Dynamics 365 CRM

**Step 1:** Create an App Registration in the “Azure portal” > “Azure Active Directory”.

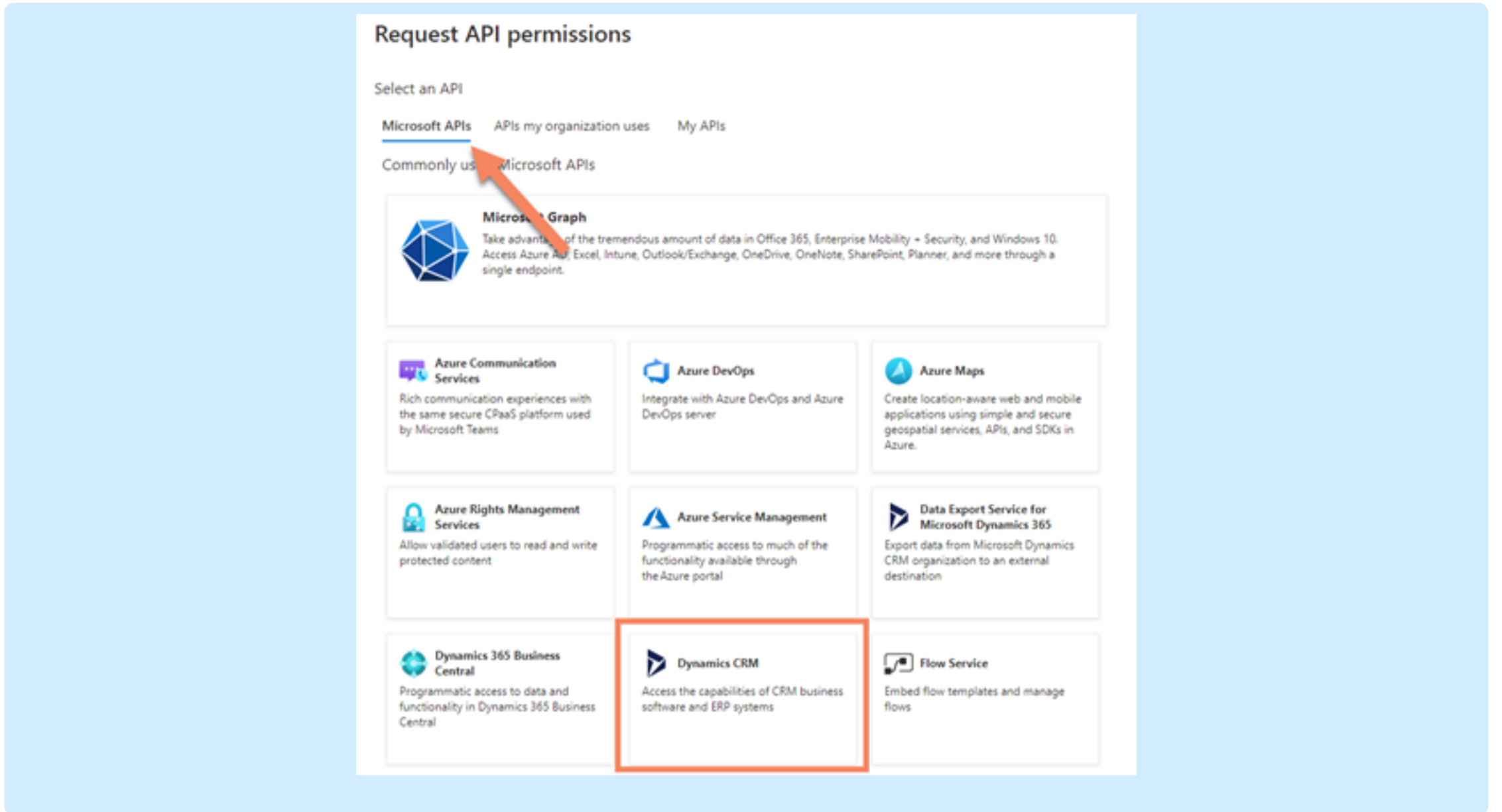




- Create a friendly name to quickly identify the registration.
- Select the scope of access for your organization.

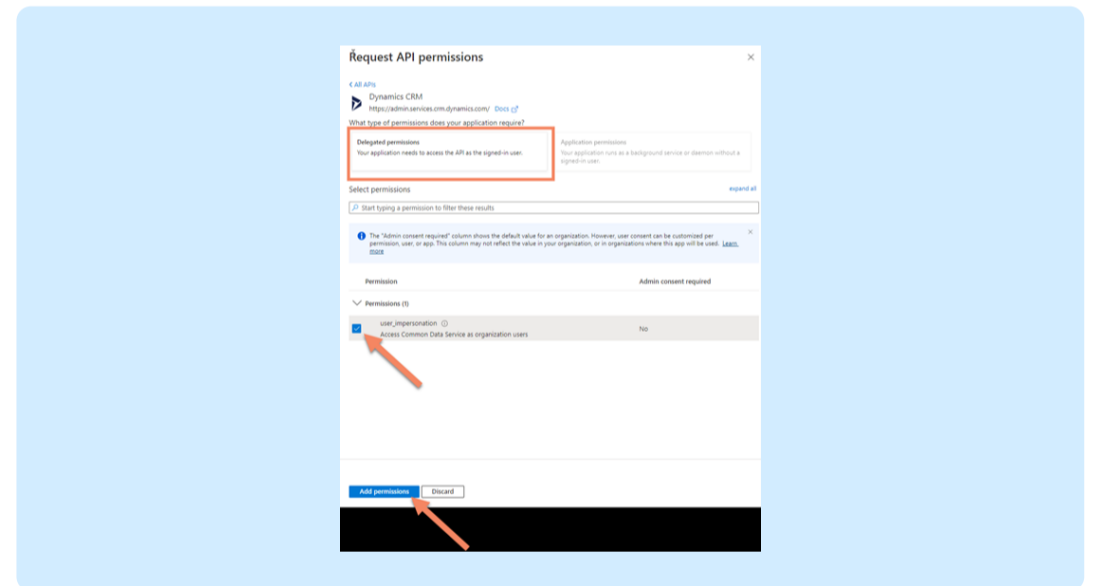


- **Step 2:** Select "API permissions" and "Add a permission"



- Add the Dynamics 365 CRM API

- **Step 3:** Click “Delegated permissions and check the options” then click on “user\_impersonation”



- Add the Dynamics 365 CRM API

